

Land under pressure - The state of large-scale land acquisitions in the World

Preliminary Results from the Land Matrix Partnership
(ILC, CDE, CIRAD, GIGA, GIZ)

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giz



INTERNATIONAL
LAND
COALITION

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G I G A

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Presentation of the Land Matrix

- Problem: lack of information about land deals
- Objectives: trace, verify, publish deals
 - Transparency, accountability
 - Data for research and policy-making
- Core: Land matrix database
- Subset to be made public in 2012
- Analytical report launch with the public interface

Presentation of the Land MATRIX

1) What is covered by the LAND matrix?

- Concessions, leases, sales of land
- Criteria: investment size > 200ha, recent transaction (2000-...)
- Several sectors but deals mainly for agricultural use
- Main variables:
 - information on target country, investor, investment, and deal.
 - Reliability ranking

2) Reliability of the data

- 0: Press reports etc.
- 1: Government records and company websites,
Research papers
- 2: Cross-checked deals
- 3: Contractual agreements known

**considered
reliable**

Global overview & focus on agriculture

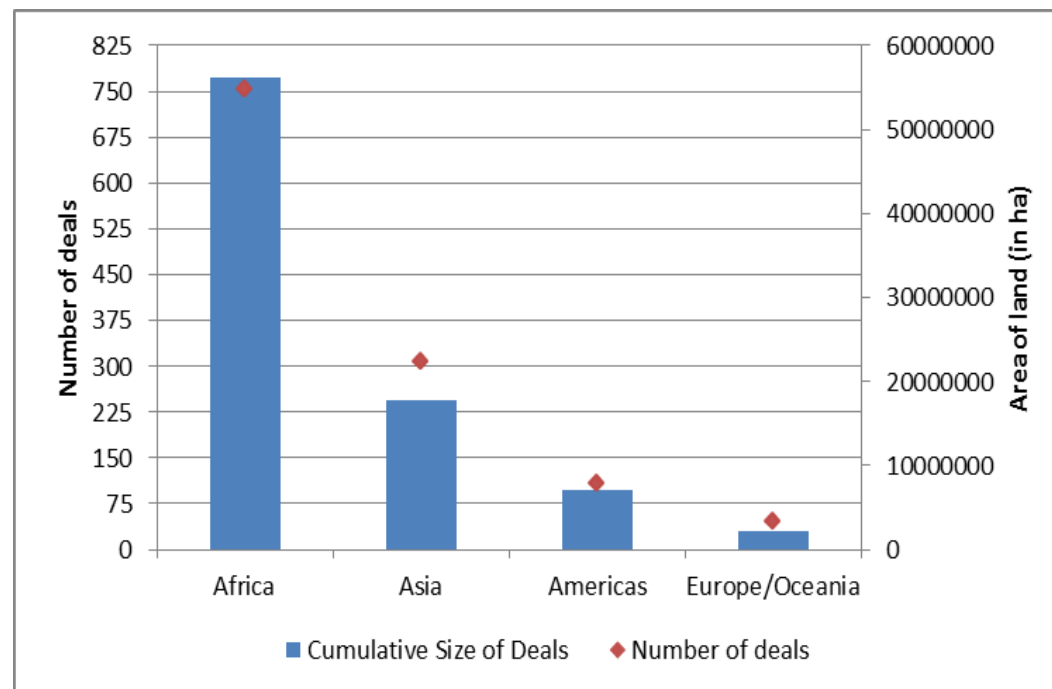
1. Global quantification
 - **1668 deals** concerning **105 million ha** (agriculture, forestry, mining, tourism, industry, conservation)
 - Agriculture is the main focus
2. Focus on deals for agricultural use

	Nb of deals	Area (in million ha)
Total reported deals	1217	83,2
Deals with area data	917	83,2
Deals with production information	925	67,8
Deals with contract signed	403	26,2

- Total area 44% larger than WB estimation
- 88 target countries and 73 origin countries of investors

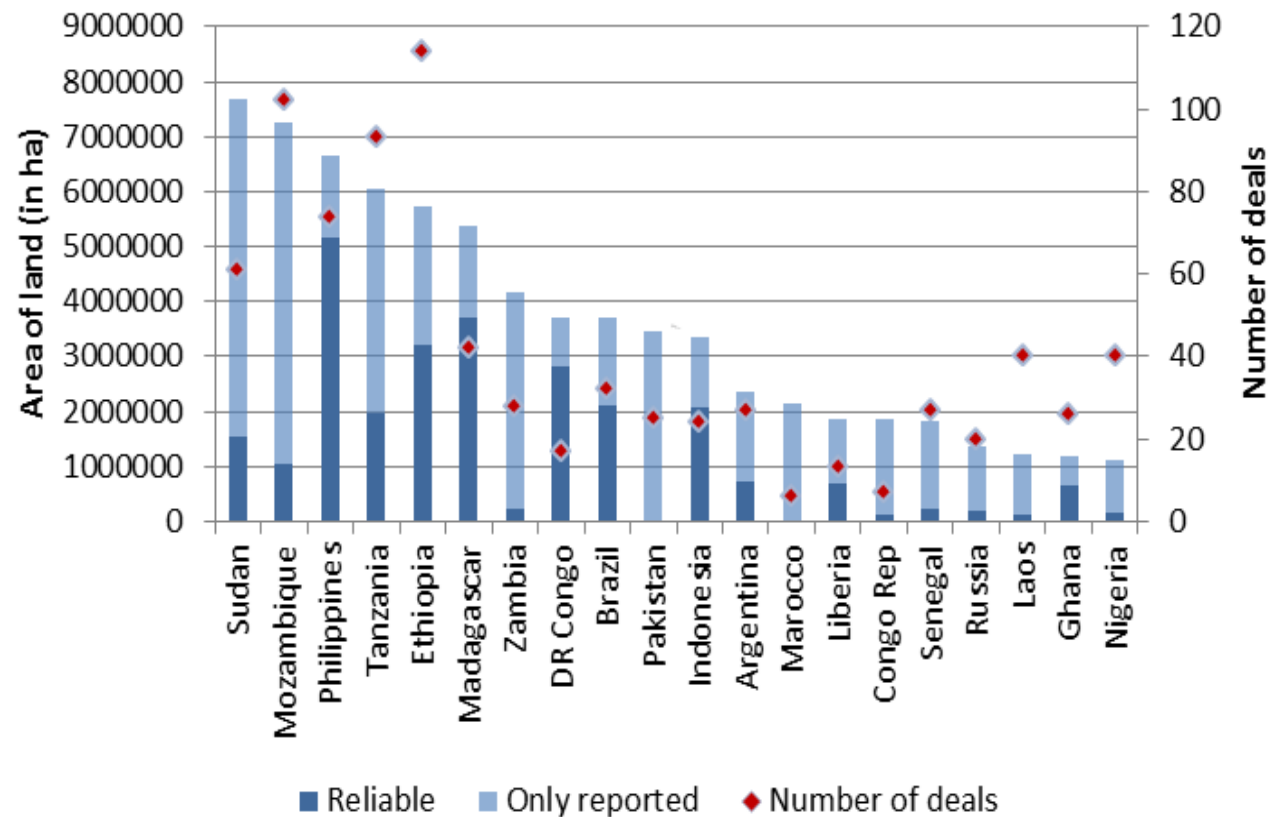
Insights into actors

- Where do the investment take place?



- Global perspective
- National level: most targeted countries, economic, institutional and agro ecological characteristics
- Local level: yield gap, accessibility, former land cover

Concentration of acquisitions

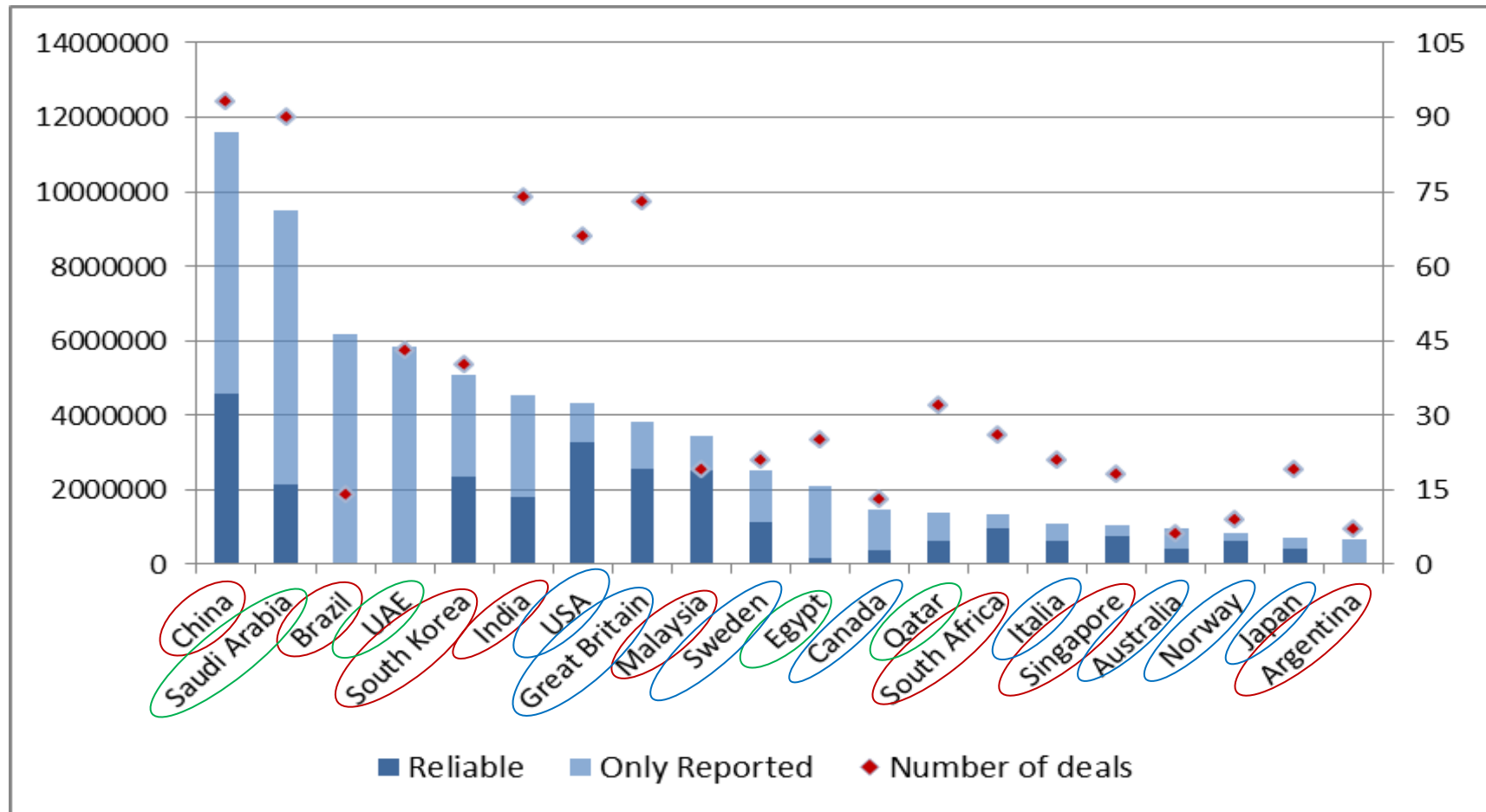


70% of the reported rush for land is concentrated in 11 countries (7 of them are African countries)

Insights into actors

- Who are the investors?
 - Type of investors
 - Strategies (domestic partners, multiple investors)
 - Investor's origin countries

Where do investors come from?

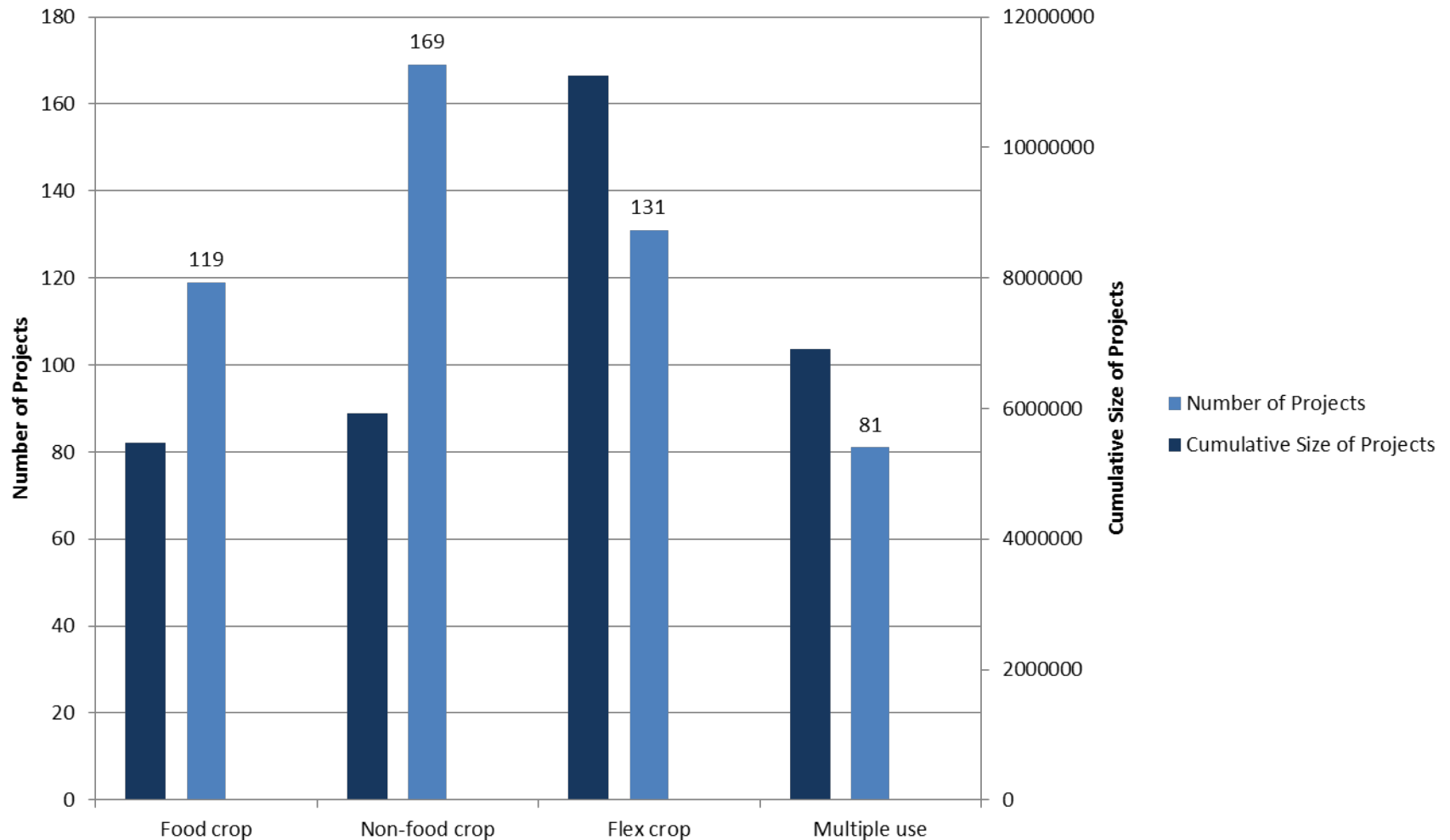


Analysis of the drivers

- "Watergrab"?
- Food, non-food, flex crops?
- Destination of the production

Drivers:

Importance of Production Purpose

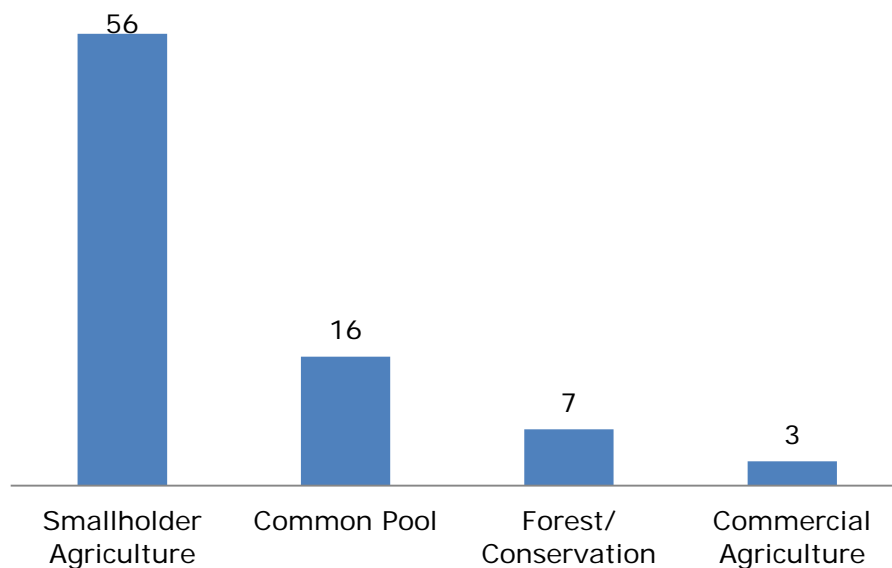


Processes and impacts

- The Land tenure security question?
- Former land use vs former land owner
- Involvement of the community
- Displacement
- Potential benefits

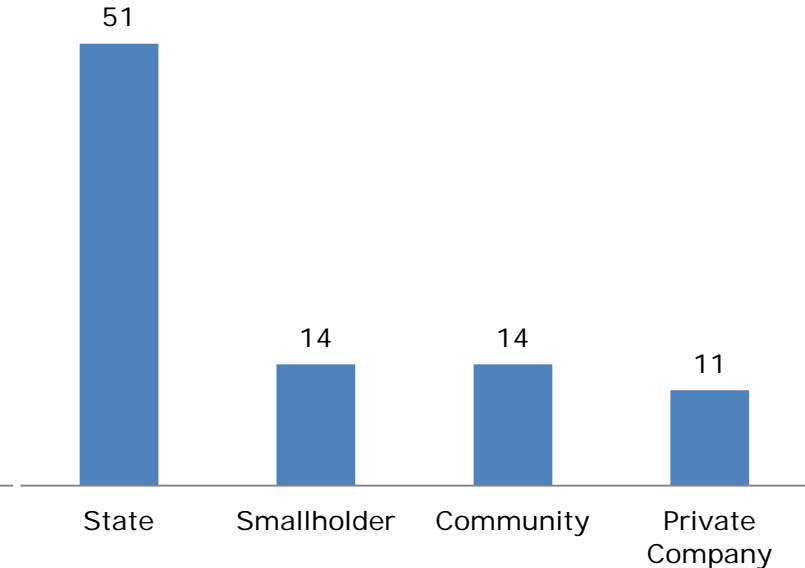
Whose land is sold?

Former Land Use



Source: Authors' calculations based on the LM.
N = 82, considering only agricultural deals.

Former Land Owner



Source: Authors' calculations based on the LM.
N = 90, considering only agricultural deals.

Summary of the main messages

- Database in itself a major outcome for policy makers and researchers – ongoing process
- Target countries: Concentration of Acquisitions: 11 countries attract 70% of LSLA, 7 of them in Africa
- Investors: Intra-Regionalism vs colonial ties
- New trend in globalized world: Outsource production to meet growing world-wide demand
- Fears seem to be true: Lack of involvement!
- Problem of poor land governance in target countries

Thanks for your attention!

Any questions?